

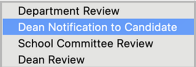







Teaching Professor Reappointment and/or Promotion using Interfolio

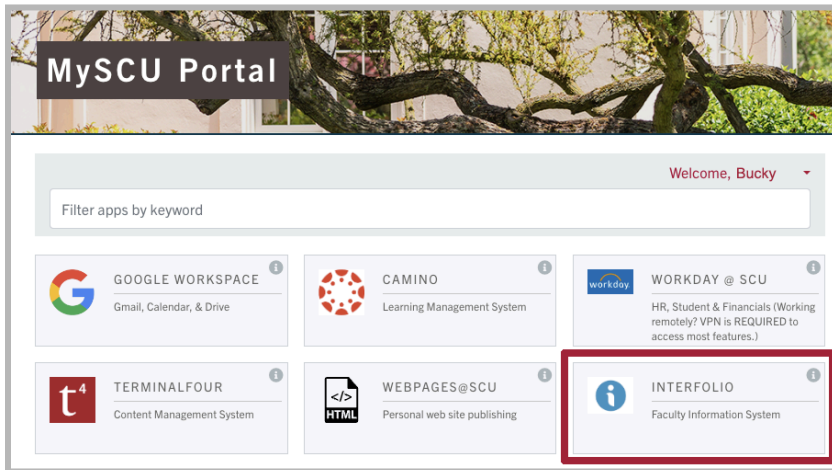
Instructions for the Dean

If the Case Involves Reappointment		If the Case Involves Promotion
<i>After department report & recommendation is submitted</i>		
1. Login to Interfolio Use the tile at the MySCU single sign-on portal.	 p. 2	1. Login to Interfolio Use the tile at the MySCU single sign-on portal.
2. Review Department Recommendation Review the department report and recommendation.	 p. 3	2. Review Department Recommendation Review the department report and recommendation.
	 p. 4	3. Notify Candidate & Upload Notification Email the candidate regarding the result of the department vote, and upload the notification in Interfolio.
	 p. 4	4. Send Case Forward If the department decision is positive, send the case to the school committee.
	<i>After school committee report is submitted</i>	
	 pp. 5-6	5. Review Case Review the case materials in Interfolio to inform your evaluation and recommendation.
Discuss Reappointment Decision with Provost [Done outside of Interfolio]	 p. 6	6. Upload Required Document Upload your recommendation at the required document area of the Case Details tab.
	 p. 7	7. Send Case Forward Send the case to the Provost.
8. Notify Candidate & Upload Notification Email the reappointment decision to the candidate and see that the notification is uploaded in Interfolio.	 p. 8	

STEP 1 - LOGIN TO INTERFOLIO

You can login to Interfolio one of two ways (A or B):

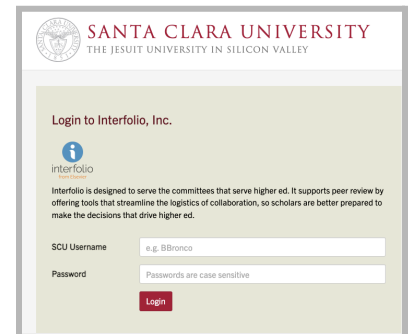
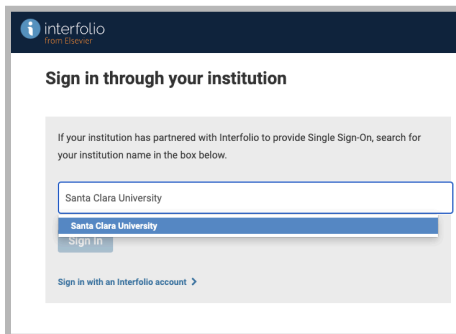
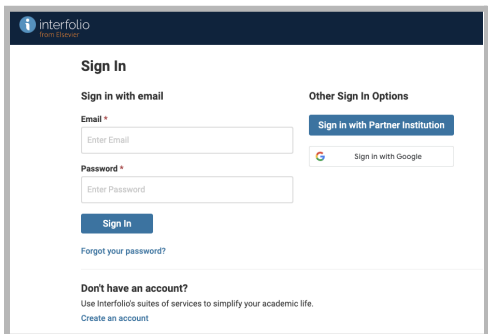
A



Sign into MySCU

Click on the Interfolio tile

B

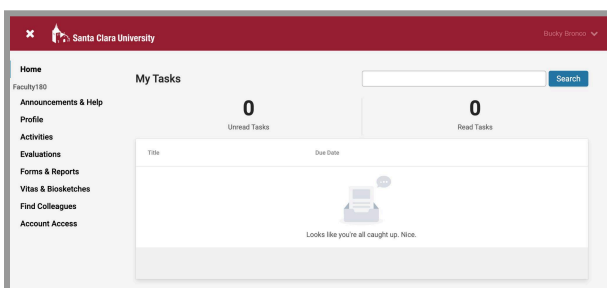


Go to <https://www.scu.edu/interfolio>

Type in Santa Clara University

Log in to MySCU Portal

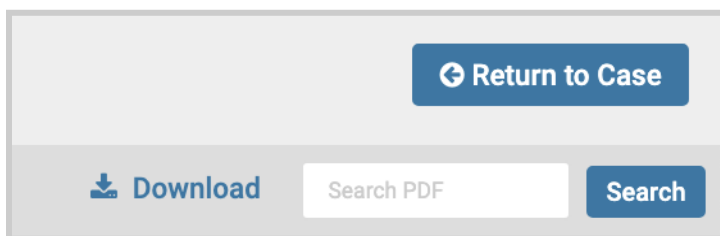
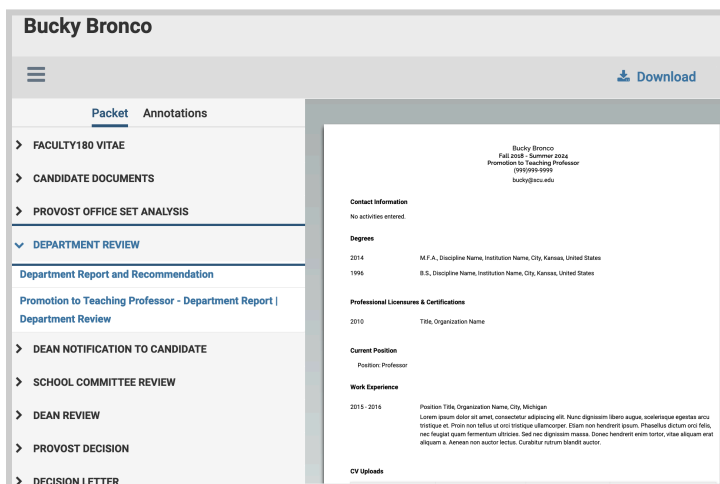
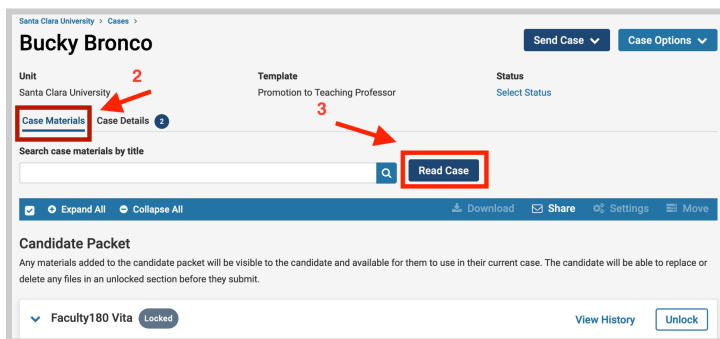
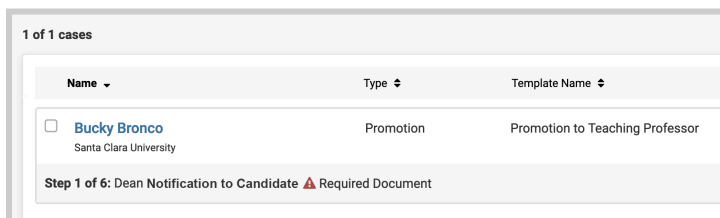
However you login, double-check that you're in the right account:



After you login, “Santa Clara University” should appear in the upper bar, and your screen should look like this (there may be cases in the central white window). If your screen doesn't look like this, you may be logged in to another Interfolio account. For troubleshooting support, contact Katie Williams (kfwilliams@scu.edu).

STEP 2 - REVIEW DEPARTMENT RECOMMENDATION

The dean is given access to the candidate's case through Interfolio when it is forwarded to the dean from the department. A trigger with the candidate's name will appear on your dashboard:



1. Click on the candidate's name in blue to bring you to the candidate's packet. *Note: The Template Name will differ depending on the type of case.*
2. Select the **Case Materials** tab (upper left) of the candidate packet.
3. Click the dark blue **Read Case** button on the right to review the candidate's packet.
4. The left sidebar lists the sections of the candidate packet. If the case is Reappointment only, there will be fewer sections in the left sidebar, and you will review it at this stage to inform your reappointment decision. If the case involves promotion review, there will be more sections in the left sidebar, and you will review the full case at a later stage. For cases involving promotion, the only thing you need to review at this stage is the Department Report and Recommendation.
5. The left sidebar lists the sections of the candidate packet. Click on the > (caret) symbol next to Department Review to expand the section and view the contents. Click on the Department Report and Recommendation. You'll see the document in the main window on the right.
6. To exit the case materials, click the blue **Return to Case** button in the top right.

STEP 3 - NOTIFY CANDIDATE & UPLOAD NOTIFICATION

(for cases involving promotion review)

1. Send a letter or email notification of the department's promotion recommendation to the candidate. Create a PDF of it on your computer.
2. Click the **Case Details** tab at the upper left. This section will reveal the dean's required item: Notification to Candidate.
3. Click on the **Add** button at the required document to upload the file. A pop-up window will allow you to browse your computer for the document.
4. After uploading the document from your computer, this screen will pop-up. In the Section field, select "Dean Notification to Candidate." Then click the blue **Add** button (bottom right) to submit.
5. If the department recommended promotion, move on to Step 4 below. If the department did **not** recommend promotion, and the case
 - includes reappointment consideration, move on to Step 8 for your final steps.
 - does not include reappointment, email Katie Williams to suspend the case (kfwilliams@scu.edu).

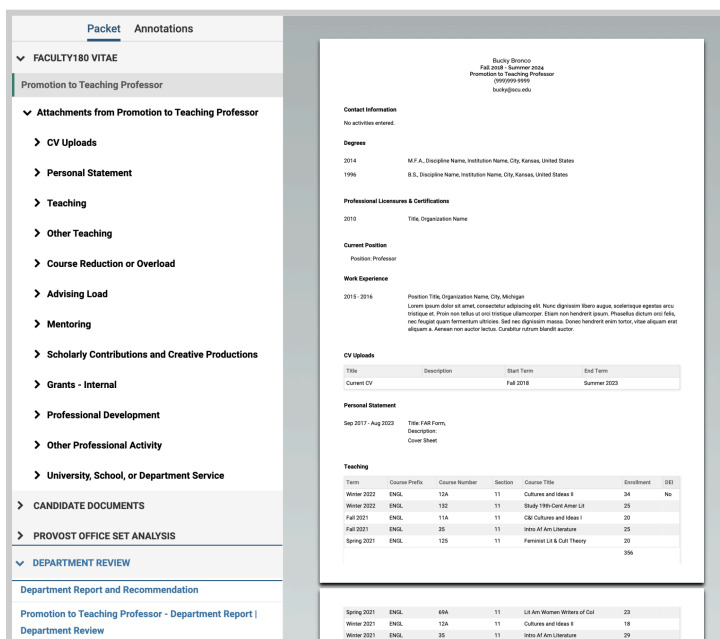
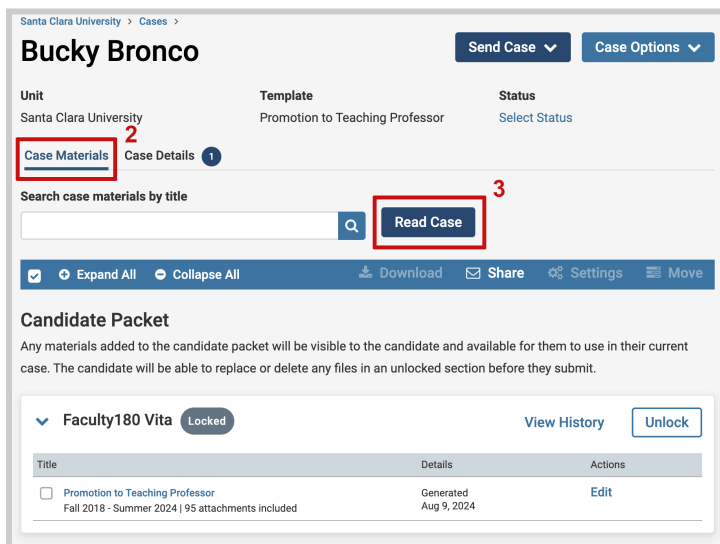
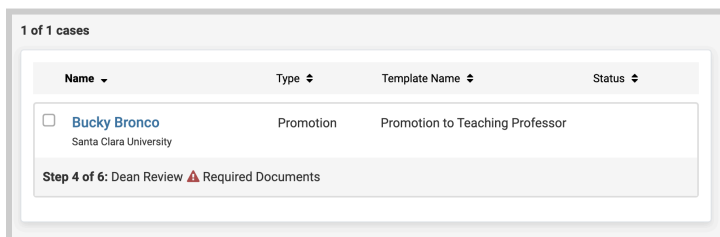
STEP 4 - SEND CASE FORWARD (for cases involving promotion review)

1. If the department promotion recommendation is positive, click on the dark blue **Send Case** button in the upper right corner to move the case to the School Committee.
2. The blue **Continue** button will be inactive (faded) until you fill in the email Subject field. After filling in the Subject, edit your message if you wish and click the now active/blue **Continue** button.

You have completed the initial steps.

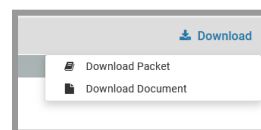
STEP 5 - REVIEW CASE

After the school committee completes its review, it will return the case to you for your review. A trigger with the candidate's name will appear on your dashboard:



1. Click on the candidate's name in blue to bring you to the candidate's packet.
2. Select the **Case Materials** tab (upper left) of the candidate packet.
3. Click the dark blue **Read Case** button on the right to review the candidate's packet.
4. The left sidebar lists the sections of the candidate packet. Click on the > (caret) symbol next to any category to expand the section and to view its contents. There will be a section for every activity category for which the candidate has uploaded files.

You can download an individual document, or the entire Faculty-180 Vitae packet, using the blue **Download** button in the



upper right of the browser window. You will re-

ceive an email when the download has completed.

In addition to the candidate's materials, the sections in the left sidebar include the **Provost Office SET Analysis** and the **Department Review**. For promotion cases, there will also be a section for the School Committee review. The SET Analysis provides a summary of SET report averages with comparison to department and school averages for the period under review, excepting the initial online quarters during COVID (Winter and Spring 2020).

- To exit the case materials, click the blue **Return to Case** button in the top right.

STEP 6 - UPLOAD REQUIRED DOCUMENT

(for cases involving promotion review)

Prepare a letter with your promotion recommendation, and upload it to the case.

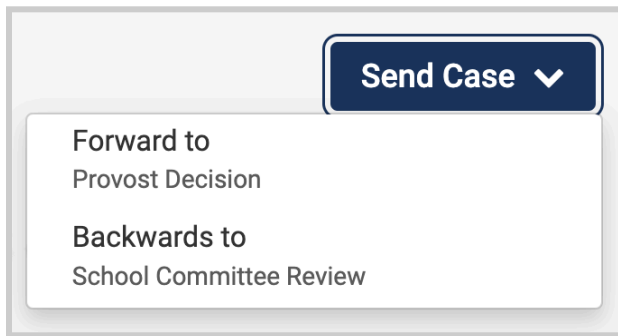
- Click the **Case Details** tab at the upper left. This section will reveal the dean's required document: the Dean Recommendation.

- Click on the **Add** button to upload your recommendation. A pop-up window will allow you to browse your computer for the file.

- After uploading the file from your computer, this screen will pop-up. The name field will populate automatically with your file name, which will be the title that appears in the left sidebar for subsequent reviewers. In the Section field, select "Dean Review." Then click the blue **Add** button (bottom right) to submit.

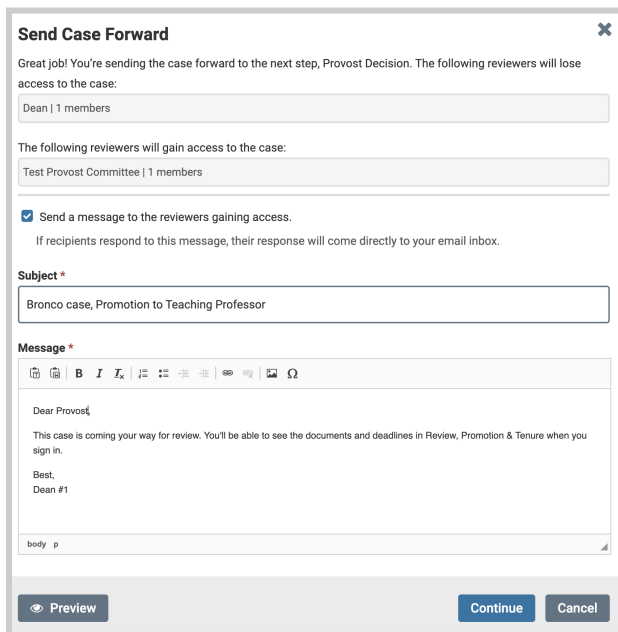
STEP 7 - SEND CASE FORWARD

(for cases involving promotion review)



A dialog box titled "Send Case Forward" with a dark blue button labeled "Send Case" and a downward arrow. Below the button, there are two sections: "Forward to" with the text "Provost Decision" and "Backwards to" with the text "School Committee Review".

Click on the dark blue **Send Case** button in the upper right corner to forward the case to the Provost Decision step.



A form titled "Send Case Forward" with a close button (X) in the top right corner. The form contains the following fields and options:

- A message: "Great job! You're sending the case forward to the next step, Provost Decision. The following reviewers will lose access to the case:"
- A text field containing "Dean | 1 members".
- A message: "The following reviewers will gain access to the case:"
- A text field containing "Test Provost Committee | 1 members".
- A checkbox labeled "Send a message to the reviewers gaining access." which is checked. Below it, a note says: "If recipients respond to this message, their response will come directly to your email inbox."
- A "Subject *" field containing "Bronco case, Promotion to Teaching Professor".
- A "Message *" field with a rich text editor toolbar. The message content is: "Dear Provost,
This case is coming your way for review. You'll be able to see the documents and deadlines in Review, Promotion & Tenure when you sign in.
Best,
Dean #1".
- A "Preview" button with an eye icon.
- "Continue" and "Cancel" buttons.

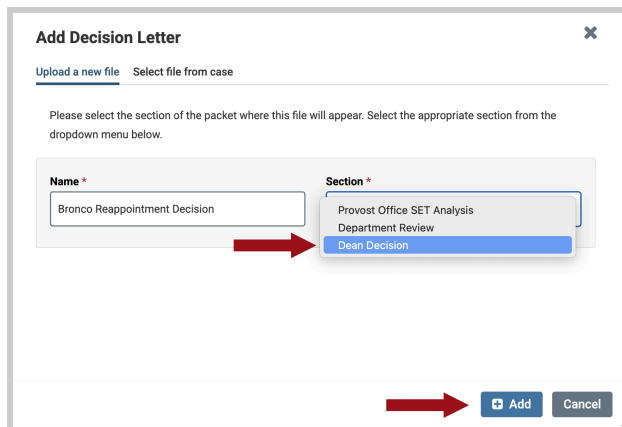
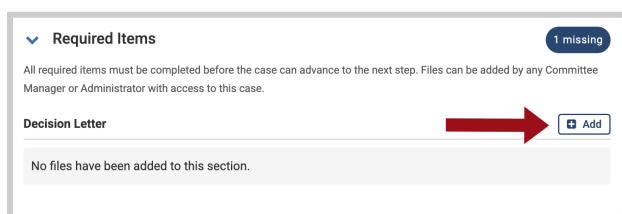
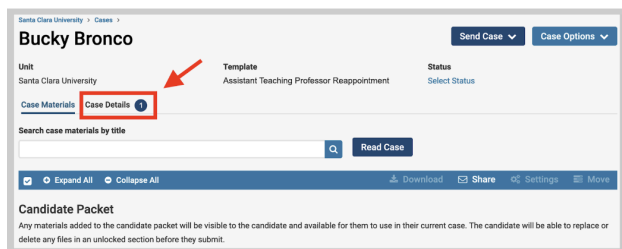
The blue **Continue** button will be inactive (faded) until you fill in the email Subject field. After filling in the Subject, edit your message if you wish and click the now active/blue **Continue** button.

STEP 8 - NOTIFY CANDIDATE & UPLOAD NOTIFICATION

A reappointment notification is not necessary in a hybrid case with a successful outcome; the promotion supersedes the reappointment decision. In these cases, you will take no further steps. A reappointment notification to the candidate is needed in the following two situations:

Situation 1: Reappointment only cases

In these cases, you will take the following steps:



1. Send a letter or email notifying the candidate of your reappointment decision. Create a PDF of it on your computer.
2. In the faculty member's case in Interfolio, click the **Case Details** tab at the upper left. This section will reveal the dean's required item: Decision Letter. Click on the **Add File** button to the right to upload the file. A pop-up window will allow you to browse your computer for the document.
3. The next window shows your file in the "Name" field, and allows you to select the section of the case where the file should be placed. Select "Dean Decision."
4. Email Katie Williams and request that she close the case (kfwilliams@scu.edu).

Situation 2: Hybrid Cases in which promotion is denied

The Provost will notify you of the promotion decision. You will make your reappointment decision independent of the promotion outcome. You will notify the candidate of that decision via email. Since you no longer have access to the Interfolio case, send a PDF of your reappointment decision email or letter to Provost Office staff and they will take care to upload it to the case (Laurene Skinner, lskinner@scu.edu or Sheryl Becker, sbecker@scu.edu).